Myridas Installation User Guide

Version 18.2 for Dynamics GP 2018 R2

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Installing m-hance Myridas 18.2 for Microsoft Dynamics GP 2018 R2

These instructions describe:

- How to install Myridas 18.2 on a Dynamics GP system on which Myridas modules have not previously been installed
- The upgrade process for an existing Myridas installation to

Myridas 18.2 from 12.0, 14.0 or Myridas 16.0

Before commencing this installation, you should back up your Dynamics and Company databases, and also back up your Microsoft Dynamics™ GP runtime software folder (e.g. C:\Program Files\Microsoft Dynamics\GP).

COMPATIBILITY:

Myridas 18.2.17 is compatible with Dynamics GP 2018 R2 without service packs.

Myridas 18.2.17 is compatible with Dynamics GP 2018 R2.

IMPORTANT POINTS IF UPGRADING AN EXISTING PRE-V18 MYRIDAS INSTALLATION :

(1) The Myridas 18.0 chunk file will not load over an existing Myridas dictionary for an earlier pre-18.2 version (Myridas 14.0 or earlier). Therefore, before starting this upgrade, you should export all Myridas customization packages (Modifier, Report Writer and VBA), and then delete Myridas.dic, F2387.dic, R2387.dic and Myridas.vba from your GP software folder.

(2) If you are upgrading an existing pre-18.2 Myridas installation to Myridas 18.2, please ensure that you have new Myridas registration keys before you start the upgrade. You must complete the upgrade to Microsoft Dynamics™ GP 2018 R2 before starting your Myridas upgrade.

(3) Security for alternate windows will not be set automatically during installation. See section 5 for further details on setting up access to Myridas windows.

(4) You can upgrade directly to Myridas 18.2 from Myridas 14.0.1 and above or, from Myridas 16.0.7 and above. If upgrading to Myridas 18 from an earlier version of Myridas, you must first upgrade to Myridas 14.0.1 or 16.0.7.

M-Hance/Myridas upgrades

You can download the installation/upgrade packages from our website at:

http://www.dynavistics.com/documentation. Just fill out the short form and the page will refresh to show available downloads.

Upgrade Paths

Current Version	Step to	Final version
GP 2018 RTM with 18.0.9 If lower than 18.0.9	None None	GP 2018 R2 with 18.2.17
GP 2016 R2 with 16.0.11 If lower than 16.0.11	None None	GP 2018 R2 with 18.2.17
GP 2016 RTM with 16.0	None	GP 2018 R2 with 18.2.17
GP 2015 R2 with 14.0.5 If lower than 14.0.5	None None	GP 2018 R2 with 18.2.17
GP 2015 RTM with 14.0.0	GP 2015 R2 with 14.0.1	GP 2018 R2 with 18.2.17
GP 2013 R2 with 12.0.4	GP 2015 R2 with 14.0.1 or GP 2016 R2 with 16.0.11	GP 2018 R2 with 18.2.17
GP 2013 SP2 with 12.0.2	GP 2013 R2 with 12.0.4 GP 2015 R2 with 14.0.1 or GP 2016 R2 with 16.0.11	GP 2018 R2 with 18.2.17
GP 2013 12.00.1826 or later If lower than 12.00.1826	GP 2015 R2 with 14.0.1 GP 2013 R2 with 12.0.4 GP 2015 R2 with 14.0.1 or GP 2016 R2 with 16.0.11	GP 2018 R2 with 18.2.17

1. Removing earlier versions of the Myridas module installer

If you are loading Myridas 18.2 onto a system with an existing installation of Myridas you must first remove the Myridas Module Installer from your system using Add/Remove programs or Programs and Features from the Windows Control Panel.

Once the uninstall has completed, ensure that the installation directory (default C:\Program Files\Myridas setup) and its contents have been deleted.

2. Installing the Myridas Module Installer

To install Myridas, run the installation executable (setup.exe) and continue as below.

The Myridas Module Installer requires the .Net Framework 2.0.

On 32 bit systems, during preparation for the setup process, the setup executable will check for .Net Framework 2.0 and will install it if it is not already present on your system. This may take several minutes.

On 64 bit systems, .Net Framework 2.0 must be pre-installed. The setup executable will not run if .Net Framework 2.0 is not installed. Click Next to reach the License Agreement screen.

In the License Agreement screen:

1. Please read the m-hance license agreement carefully. To continue select I accept the terms in the license agreement.
2. Click Next to continue. The Customer Information screen will appear.

Note that if you do not agree to accept the m-hance license agreement, the installation will be cancelled.

In the Customer Information screen:

1. Enter the User Name and Organization name for the installation.
2. Click Next to continue. The Destination Folder screen will appear.

In the Destination Folder screen:

1. Click the Change… button to select a destination folder for your Myridas installation, or accept the default installation setting.
2. Click Next to continue. The Ready to Install the Program screen will appear.

In the Ready to Install the Program screen:

You are now ready to install Myridas.

1. Check that your Myridas installation options are correct.
2. Click Back to review any of your settings or Install to begin the installation.

Please wait whilst the software is installed.

During the installation, a status bar will show you how much progress has been made. When the installation is complete, the completion screen will open. Any problems encountered during the installation will be displayed in this screen.

Click Finish to complete the installation of the Myridas Installer.

3. Installing the Myridas modules

3.1 Before running the Myridas Module Installer

To use version 18.2 of the Myridas modules you must have the following installation:

 Microsoft Dynamics™ GP 2018 R2

Myridas 18.2.17 is compatible with Dynamics GP 2018 R2

In order to run an evaluation copy of the Myridas modules, you will need to have the lesson company Fabrikam Inc installed on your system.

3.2 Running the Myridas Module Installer

When you installed the Myridas Module Installer on your computer (Section 2) an icon was added to your desktop. Running the Myridas Module Installer performs the following functions:

- Creates additional tables in your Dynamics database
- Creates additional tables in your company database (Fabrikam Inc if you are running an evaluation)
- Creates necessary SQL triggers and stored procedures in your company database
- Places the Myridas chunk file and related files into your Microsoft Dynamics™ GP folder

To run the Myridas Module Installer:

- Double click the Myridas Setup icon on your desktop, or:
- Locate and run the file "MyridasInstaller.exe"

In the Terms and Conditions screen:

1. Please read the terms and conditions and select I accept and have the authority to accept, m-hance's terms and conditions of business. This agreement will also be installed in pdf format when Myridas is installed onto your computer.
2. This Terms and Conditions screen will only be displayed once. It is recommended that you print m-hance's terms and conditions. To do so click Print.

3. Click Next to continue.

In the Server and Program Locations Screen:

1. Enter or select the location of your Microsoft Dynamics™ GP installation. The Myridas chunk file will be placed in this folder, e.g. C:\Program Files\Microsoft Dynamics\GP
   Enter the System Administrator (sa) password for SQL Server. This will allow tables and SQL triggers etc to be created.
2. Enter the name of your SQL server.
   The drop down list shows available SQL Servers. In order to be accessible to the Myridas Module Installer you must have set up an ODBC System data source (not a User DSN) for the SQL Server on which you wish to install Myridas.
   Only for Myridas versions 14.0.1 or below: On a 64 bit system, a 64 bit ODBC connection is required. (This differs from the Microsoft Dynamics GP ODBC requirement).
3. Click Next to continue.

In the System Database screen:

If multiple GP instances are installed on your sql server, select the system database name for the GP instance to which you wish to install. If there is a single system database (usually DYNAMICS) this will be selected automatically and cannot be changed.

In the Registration Keys Screen:

Note, if you are installing an evaluation copy of the Myridas modules, you can leave <u>all</u> entries on the Registration Keys screen blank.

If you are upgrading an existing pre-version 18 Myridas installation to Myridas 18, you must enter your new Myridas registration keys at this point. If upgrading an existing Myridas 18.0 or 18.2 installation, e.g. 18.0.1 to 18.0.7, your existing registration keys are still valid. Note that only Full Dynamics GP Users have access to the Myridas modules.

1. Enter your registration information (company name, number of licensed users and registration keys)
2. Click Next to continue.

Upgrade Screen

If you are installing Myridas 18.2 into an existing installation, the

Myridas module installer will recognize that an upgrade is required. Click the Install button when prompted to do so to update your existing Myridas installation to the new version. This may take several minutes.

You can then use the Installation Options screen to add new modules to your installation, or press Exit to close the Myridas Module Installer. If any errors occur during the upgrade, a red warning message will appear when the upgrade is complete. Details of errors are logged in the MyridasInstaller event log.

In the Installation Options Screen:

1. From the drop-down list, select the company where you would like to install Myridas. If you are running without registration keys you will only be allowed to set up modules in Fabrikam Inc.
2. Select the Modules you wish to install, or press the Select All button to install all the modules permitted by your registration keys.
   (Note that Document Merge is listed as a separate module but can only be installed in conjunction with Consolidated Invoicing)

3. Press Next. On the next screen, press Install to confirm that you wish to continue with the installation. This may take several minutes to complete.
4. When the installation is complete, press Next to return to the Installation Options screen where you can install the Myridas modules for additional companies, or press Exit to close the Myridas Module Installer. See also section 3.7 for Advanced Options.

5. If any errors occur during the installation, a red warning message will appear when the installation is complete. Details of errors are logged in the MyridasInstaller event log.

When you have finished your installation, run Microsoft Dynamics™ GP as normal to load the Myridas chunk file and update your Dynamics.set file. See page 3 for steps to follow before loading the chunk file into an existing pre-version 18 Myridas installation.

If upgrading an existing pre-version 18 system, after the Myridas 18.0 chunk file has installed you can import any customization packages exported before starting the upgrade.

3.3 Client installations

If you have Microsoft Dynamics™ GP installed on additional client computers, you also need to install or update Myridas on the client installations. To do this, perform the following steps:

1. If upgrading an existing pre-version 18 Myridas installation, follow the instructions on page 1 with regard to exporting customization packages and deleting dictionaries from earlier versions.
2. Run myridasclient.exe on each additional client computer. This file can be found in your Myridas Setup folder.
3. Enter the location of the Microsoft Dynamics™ GP installation. Files will be copied to this folder.
4. Run Microsoft Dynamics™ GP as normal to load the Myridas chunk file.
5. If upgrading a pre-version 18 Myridas installation, import any required customization packages.

3.4 Setting up Security to allow access to Myridas functionality

Before you can use Myridas functionality, you need to set up Security Task Ids to include Myridas windows and reports.

Some of the Myridas modules require the use of alternate Dynamics GP windows and reports. If you have installed one of these modules you will need to add the relevant Myridas alternate windows to your Alternate/Modified Forms and Reports Ids.

See the Microsoft Dynamics™ GP Documentation for full information on planning and setting up security on your Dynamics™ GP system.

See section 5 for additional options for setting up Myridas security.

See section 6 for details of the alternate windows and reports required by the Myridas modules.

3.5 Updating or amending your installation

Once you have installed the Myridas modules, you can re-run the installer (Section 3.2) to do any of the following:

- Enter new registration keys
- Set up Myridas for additional companies (if you have valid registration keys)
- Enable additional modules in an existing company
- Disable previously enabled modules for any company (this will prevent further use of Myridas functionality, but will not remove your data from the database)

3.6 Advanced Options

The Advanced button on the Installation options screen opens the Advanced Options window which allows you to do the following:
 Drop and create all stored procedures/ZDPs/triggers re-installs the Myridas sql code in the selected company.
 Remove Myridas from above company removes all Myridas tables, triggers and stored procedures from the selected company. Remove Myridas from all companies removes all Myridas tables, triggers and stored procedures from all companies.* *Having removed Myridas from your system, you may also want to delete the Myridas dictionary from your Microsoft Dynamics™ GP installation folder and edit your Dynamics.set file to delete the Myridas dictionary entry.

4. What's included with the Myridas system?

4.1 Software modules

Myridas 18.2 includes the following modules:

- Additional Charges
- Advanced Inventory Replenishment
- Automated Data Capture
- Call Scheduling
- Catalogue Based Sales Catchweights
- Consolidated Invoicing
- Distribution Enhancements
- Distribution Extensions (Myridas 11.0.1 and above)
- Duty Processing
- En Primeur and Paid Reserves
- Extended Pricing Integration (previously Extended Pricing Data Import)
- Extended Pricing Enhancements
- Financials Enhancements
- Forward and Scheduled Orders
- Inter-Site Transfers
- Item Life Cycle
- Item Manager
- Linked Item Selling
- Price Negotiation
- Purchase Retrospective Discounts
- Reorder Level Management
- Reserved Stock
- Returns Management
- ROC Interface (Only relevant for users of the Myridas Remote Order Capture application).
- Sales Analysis History
- Sales Navigator
- Sales Pattern Analysis
- Sales Retrospective Discounts

- Template Selling
- Unit of Measure Management
- Vehicle Load Planning
- Vendor Pricing

4.2 Documentation

The following documentation is available:

- Myridas Download and Install (this document)
- Myridas User Guides for all Myridas modules
- On-line help for all Myridas modules

5. Setting up Myridas security

5.1 Creating a task for all Myridas windows

A facility to create a task incorporating all Myridas windows and reports is available. This option is provided to help you get started with Myridas functionality.

There are two ways to access this facility:
Either:

(i) After installing Myridas, log in to the system as “sa”. You will be prompted with the option to create the task “MYRIDASSECURITY-ALL-OPS”. If the option is accepted, all Myridas windows and reports will be added to this task.

Or:

(ii) In the Security Task Setup window, select Additional >> Create/Update Myridas task.

You can then add the MYRIDAS-SECURITY-ALL-OPS to any security roles as required.

5.2 Applying security to Myridas alternate forms and reports

You can use the Dynamics GP Alternate/Modified Forms and Reports window to add the required Myridas alternate forms to your alternate/modified forms and reports Ids.

See section for 6 for details of the alternate forms and reports associated with each Myridas module. These are also documented in the individual module User Guides.

Within the Dynamics GP Alternate/Modified Forms and Reports window, Additional options are provided to assist you with addition of the correct Myridas alternate forms.

(i) Additional >> Show Myridas Required: select this option to display only the windows and reports which are required for the Myridas modules that you have installed in the current company.

(ii) Additional >> Show Myridas Incorrect: select this option to display any windows where the Myridas alternate has been

selected but is not required for the Myridas modules that you have installed in the current company.

(iii) Additional >> Show All to turn off either of the above restrictions.

These options are applied when either Myridas or All Products is selected from the Product dropdown list.

Please not that any changes you make will only be reflected in the restricted lists after you Save the alternate/modified forms and reports

Id.

6. Myridas alternate forms and reports

Window Name	Description	Modules
Apply Sales Documents	"Apply by aging period" option	Financials Enhancements
Bin Quantity Enquiry	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management
Bin Quantity Entry	Allows entry of bin catchweight details	Catchweights
Bin Quantity Transfer Entry	Allows entry of bin catchweight details	Catchweights
Bulk Picking Print	Includes options for Bulk Picking by Load	Load Planning
Generate Suggested Purchase Orders	In the vendor pricing module there is an additional option in this window to allow generation of zero quantity P.O.s and selection of vendor groups, also additional information on the Preview window. This alternate window MUST be used when using a system that includes the Vendor Pricing module	Vendor Pricing
Inventory Activity Reports	Used in Unit of Measure Management to print reports in split pack format	Unit of Measure Management

Inventory Available to Promise Enquiry	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management, Reserved Stock

Item Bin Transfer Entry	Allows entry of bin catchweight details	Catchweights
Item Price List Enquiry	Allows entry of Price Method per line, discount group and Based on U of M	Distribution Extensions
Item Price List Maintenance	Displays Price Method per line and discount group	Distribution Extensions
Item Stock Enquiry	Shows Quantities in split pack format if using the Unit of Measure Management module. Shows Catchweight quantities if using the Catchweight module.	Unit of Measure Management, Catchweights
Items	Alternate item number lookup which includes status code information, unit of measure management options, duty processing consolidated stock view and new Find button to search item catalogue	Item Lifecycle, Unit of Measure Management, Duty Processing, Catalogue Based Sales
PO Assignment for Sales Document	Optional alternate window showing Qty Committed and Qty Available on PO.	Distribution Enhancement s

Print Sales Documents	Includes reprint options for Collection Notes (Returns Management module). This alternate window MUST be used when using a system that includes the Myridas Returns Management module.	Returns Management
Purchasing Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes the Myridas Catchweights module.	Catchweights

Purchasing Returns Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes the Myridas Catchweights module.	Catchweights
Quantities by Site	Shows Quantities in split pack format if using the Unit of Measure Management module	Unit of Measure Management
Sales Automatic Order Allocation	Includes option to select by Route range if using the Myridas Load Planning module	Load Planning
Sales Bulk Confirmation	Option to open Sales Transaction Entry window. Catchweight confirmation warning indicator on documents where a Catchweight actual weight needs to be entered.	General, Catchweights

Sales Document Print Options	Includes reprint options for Collection Notes (Returns Management module) and additional functionality for the Load Planning module. This alternate window MUST be used when using a system that includes the Myridas Returns Management or Load Planning module.	Returns Management, Load Planning, Consolidated Invoicing
Sales Item Detail	Not required for any Myridas module	
Sales Lot Number Entry	Displays dual quantity catchweight balances. This alternate window MUST be used when using a system that includes Catchweights, Duty Processing or En Primeur/Paid Reserves.	Catchweights , Duty Processing En Primeur & Paid Reserves
Sales Multiple Orders to	Includes option to select by Route range if using the Myridas Load Planning module	Load Planning

Invoices Transfer		
Sales Quantity Shortage Options	Expansion window to view Duty Processing consolidated stock balance. This alternate window MUST be used when using a system that includes the Myridas Duty Processing module. Take from Reserved Stock button to display Reserved Stock Allocation window.	Duty Processing, Reserved Stock

Sales Transaction Enquiry Zoom	Provides a facility to filter individual despatch lines from consolidated invoices. In the Returns Management module, the original invoice number is displayed for Returns based on invoice. This alternate window MUST be used when using a system that includes Myridas Consolidated Invoicing or Returns Management.	Consolidated Invoicing, Returns Management
Sales Transaction Entry	Incorporates Returns Management options and additional requirements for Catchweights, Load Planning, Reserved Stock and Duty Processing modules. This alternate window MUST be used when using a system that includes Myridas Returns Management, Catchweights, Load Planning, Reserved Stock, Sales Navigator or Duty Processing	Returns Management, Catchweights , Load Planning, Reserved Stock, Duty Processing, Sales Navigator
Stock Count Lot Number Entry	Displays Mark All and Unmark All buttons	Distribution Enhancement s
Stock Count Serial Number Entry	Displays Mark All and Unmark All buttons	Distribution Enhancement s

Report Name	Description	Modules
IV Item Price List	Shows Price Method per line	Distribution Extensions
IV Item Price List MC	Shows Price Method per line	Distribution Extensions
SOP Other Invoice Form	Invoice in graphical format incorporating additional features for Consolidated Invoices	Consolidated Invoicing
SOP Other History Invoice Form	Invoice in graphical format incorporating additional features for Consolidated Invoices	Consolidated Invoicing
SOP Blank Invoice Form	There are no changes to this report in standard Myridas; it is included to allow easier customization of invoices with Myridas tables.	
SOP Blank History Invoice Form	There are no changes to this report in standard Myridas; it is included to allow easier customization of invoices with Myridas tables.	
SOP Blank Packing Slip Form	There are no changes to this report in standard Myridas; it is included to allow easier customization of packing slips with Myridas tables.	
SOP Blank Order Form	There are no changes to this report in standard Myridas; it is included to allow easier customization of orders with Myridas tables.	

Sales Bulk Picking Ticket	There are no changes to this report in standard Myridas; it is included to allow easier customization of picking tickets with Myridas tables.	
SOP Blank Picking Ticket Bin Sequenced	There are no changes to this report in standard Myridas; it is included to allow easier customization of picking tickets with Myridas tables.	
SOP Blank Picking Ticket Order Entered	There are no changes to this report in standard Myridas; it is included to allow easier customization of picking tickets with Myridas tables.	

7. Distribution Extensions module

Additional installation steps must be followed in order to use the import/export functionality in the Distribution Extensions module.

See Installing Myridas .net Extensions and also see the Distribution Extensions User Guide for more details.

8. Inter-Site Transfers module

Additional installation steps must be followed in order to use the econnect option in the Inter-Site Transfers module.

See Installing Myridas .net Extensions and also see the Inter-Site Transfers User Guide for more details.

9. Myridas Integration with SmartList

The Smartlist Integration module is one of the modules available for installation. This module enables integration between several other Myridas modules and Microsoft Dynamics™ GP SmartList. If you require SmartList integration with any of the following modules then ensure that you install this Smartlist Integration.

Module	Functionality
Load Scheduling	Vehicle Table
Item Status	Item Status Table and status code as column on items
Reorder Level Management *	Calendar Usage Table and Fiscal Usage Table
Distribution Enhancements	Sales Transaction Reason Code Table and Inventory Transaction Reason Code as separate views and as columns on transactions

- The installation of Smartlist Integration is essential for the Reorder Level Management module.

10. Installing Myridas .net Extensions

In order to use eConnect to create Inter-Site Sales Orders in the InterSite Transfer module or to import Purchase Orders and Price Lists in the Distribution Extensions module, an additional application must be installed.

This is the TCS.Myridas.V18.Extensions application.

To install, run the TCS.Myridas.V18.Setup.msi installation package which you will find in C:/Program Files/Myridas Setup/Runnable System/Additional Components/Myridas Extensions or similar, depending on the location of your Myridas installer.

This should be installed on each machine running a GP client. In addition, Dynamics GP eConnect must be installed and the eConnect integration service must be started. See Microsoft Dynamics GP documentation for further details of eConnect.

11. Myridas and the GP web client

Myridas modules may be used within the Dynamics GP web client but there are some functionality restrictions.

- Addition of lines using base return on invoice functionality in Returns Management is not available
- Creation of scheduled orders in the Forward and Scheduled Orders module is not available
- Processing of Additional Charges is not available.

Some other windows may not function correctly due to limitations of the GP web client.